

Project Close-Out

Post Implementation Report & Lessons Learned

Initial Release	1.0
Date:	January 1997

What is a Post Implementation Evaluation Report?

A Post Implementation Evaluation Report (PIER) documents the successes and failures of the project. It provides a historical record of the planned and actual budget and schedule. Other selected metrics on the project can also be collected, based upon state organization procedures. The report also contains recommendations for other projects of similar size and scope.

There is currently a PIER that is used by the Department of Finance to complete the file on a particular project that was funded based on a Feasibility Study Report (FSR).

- Staffing and skills
- Project organization
- Schedules
- Successful risk assessment and mitigation techniques
- Processes used for change control, quality, and configuration management
- Techniques used for project communication
- Techniques for handling customer expectations
- Critical success factors and how they were met
- Financial data

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Conduct a Lessons Learned Session to Identify and Address Problems

In addition to communicating the closure of a project in writing, it is also advisable to have a mechanism for group review. A “lessons learned” session is a valuable closure and release mechanism for team members, regardless of the project's success. Some typical questions to answer in such a session include:

- Did the delivered product meet the specified requirements and goals of the project?
- Was the user/client satisfied with the end product?
- Were cost budgets met?
- Was the schedule met?
- Were risks identified and mitigated?
- Did the project management methodology work?
- What could be done to improve the process?

The lessons learned session is typically a large meeting that includes:

- Project team
- Stakeholder representation - including external project oversight
- Executive management
- Maintenance and operation staff

Such a session provides official closure to a project. It also provides a forum for public praise and recognition or offers an opportunity to discuss ways to improve future processes and procedures.

Document Lessons Learned

The purpose of the PIER is to document lessons learned. This means that problems encountered by the project team are openly presented. Problem identification on completed projects provides a method to discuss the issue in hopes of eliminating its occurrence in future IT endeavors. It is important, however, that the problem discussions do not merely point a finger away from the project team; responsibility and ownership for problem areas are critical to developing useful recommendations for future processes.

Problems that were encountered should be prioritized with focus on the top five to ten problems. It is not necessary to document every small thing that happened.

Since problems or sensitive issues may be discussed in the *PIER and Lessons Learned*, it is helpful to have any organization identified as a contributor included in a review of the material prior to formally submitting the document. It is useful to have the reviews in an interactive forum where all parties can discuss their recommendations for improvement. The PIER can then present a complete view of the system.

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Identifying and Addressing Success

Be certain that successes as well as problems on the project are identified in thePIER. Be certain to include new ideas that were very successful on the project. Make recommendations on how these processes might be adapted for other projects.

Share the project successes with other organizations in the state organization. In the same way that problem identification can lead to improvements, successes must be shared so they can be repeated. Where possible, successes should be translated into procedures that will be followed by future projects.

Who Prepares the Report?

The project manager typically has responsibility for preparing the report. The project manager gets input from the entire project team, the users, and other major stakeholders. People performing different functions on the project will have a different outlook on the successes and failures and on possible solutions. If every project member cannot be consulted, at least ensure that a representative from each major area of the project participates. The users' overall view of the project and its final product is also a major focus of the project. It is this view, along with the view of the major stakeholders that lives on after closure has been completed.